

Summary of Changes  
To  
Procedure 242.1  
Revised Version Issued as P242.1B

LM Procedure 242.1, Forms Procedure, of 4/2/07, has undergone minor revisions during the required annual review. Under 8. "Document Control, duplicated words and effort were eliminated. Item 9. d was edited for clarity.

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# U.S. Department of Energy Office of Legacy Management



Procedure: 242.1B

Effective: 4/24/08

SUBJECT: FORMS PROCEDURE

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1. PURPOSE. To establish the process for creating and maintaining LM forms.
2. CANCELLATION. Procedure 242.1a, Forms Procedure dated 4/2/07.
3. REFERENCES.
  - DOE Guide 242.1-1, Forms Management Guide.
4. DEFINITIONS.
  - a. LM Form -- A form designed to be used by LM employees to obtain services, report information, obtain information.
5. QUALITY CONTROL. The quality of all LM forms is the responsibility of the LM Forms Manager.
6. RESPONSIBILITIES.
  - a. Directives Manager oversees Department of Energy Orders that are of interest to the Office of Legacy Management and oversees the development of LM policies and procedures.
  - b. LM Forms Manager shall oversee the forms process and ensure that these procedures are maintained and updated as needed.
  - c. Initiator shall request new LM forms or modifications to existing forms through the LM Forms Manager.
7. TRAINING REQUIREMENTS. There are no specific training requirements for this procedure.

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**INITIATED BY:** Office of Business Operations  
**NO. OF PAGES/ATTACHMENTS:** 3 pages

8. DOCUMENT CONTROL. All documentation created under this procedure is the responsibility of the LM Forms Manager.
9. PROCEDURE.
  - a. The initiator submits a hard (paper) copy of the new or modified form to the LM Forms Manager. The request will designate creation of a new form, modification of an existing form, or removal of an existing form from circulation.
  - b. The Forms Manager
    - (1) Ensures that the initiator has reviewed the process and the requested new or modified form will be applicable, to the maximum extent possible, to all LM geographical locations. The request to delete a form must be accompanied by substantiation that the form is no longer needed.
    - (2) Updates the form spreadsheet to include form number, title, point of contact and status.
    - (3) Assigns a new form number and office of principal interest (OPI) code, if necessary, from the Directives Manager.
    - (4) Ensures that personal identifiers (e.g., name, extension) are omitted to reduce future maintenance of the form
    - (5) Transmits the requested form or modified form to the support contractor for creation as a Microsoft Word form.
  - c. To create or modify a form, the LM forms support contractor --
    - (1) Creates or modifies the LM Form in “fillable” format in Microsoft Word and ensures that
      - (a) The new form number, issue or revision date, and OPI code appear in the form number box.
      - (b) Formatting and naming conventions are in accordance with DOE Guidelines.
    - (2) After the file is in the final format, e-mails an electronic (Microsoft Word or Adobe Acrobat PDF format) copy to the Forms Manager to obtain the approval of the initiator, requesting a response within one (1) week. Lack of a response implies approval of the form. The new form will be posted on the Intranet “Forms” home page by the Webmaster as given to them by the Forms Manager.

- d. To remove the form from circulation

After determining a form is no longer required, the LM Forms Manager notifies the Intranet Manager to remove the form from the Forms section. The form will then be retained in hard copy in the permanent records of LM.

Approved: Original signed by  
Celinda H. Crawford  
Director  
Office of Business Operations

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